



# Broker Account Management

*November 2019*



U.S. Customs and  
Border Protection





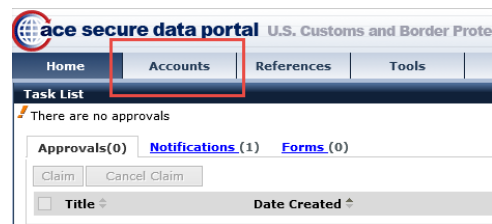
# INTRODUCTION

There have been two changes to the process of uploading employee information with the mass update spreadsheet.

- You now enter current employment information in the **Employment History #1** section of the spreadsheet.
- ACE now maintains an employee history for broker employees. Therefore, the **Delete** function is no longer available in the mass update spreadsheet. When employees separate from the company upload a spreadsheet with an add/replace action for their records and include an **Employment End Date** for **Employment History #1**.

## UPLOAD EMPLOYEES

1. Login to the **ACE Secure Data Portal**.
2. Select the **Accounts** tab.  
The **Accounts** tab displays.



3. In the **Task Selector** panel, from the **Select Account Type View:** drop-down menu, select **Broker**.
4. In the **Task Selector** panel, select the **GO** button.  
The broker view of the **Accounts** tab displays.
5. In the **Account Selector List** panel, select a broker account.  
The broker's details displays in the **Broker** panel.
6. In the **Broker** panel, select the **Employees** tab.  
The **Employees** tab displays with records of the broker's employees.





7. Select the **Upload Employees** button.

The **Upload File** section of the **Broker** panel displays.

[Contacts](#)
[Addresses](#)
[Licensed Brokers](#)
[Employees](#)
[Waiver Requests](#)
[Permit User Fees](#)

[Upload Employees](#)
[View Uploads](#)

Showing 1 - 4 of 4

Name	Street (Physical) Address
<a href="#">Employee01 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314
<a href="#">Employee02 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314
<a href="#">Employee03 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314
<a href="#">Employee04 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314

**Broker**

**Upload File**

File:

[Download Template](#)

Batch Sequence #	File Name	Submit Date/Time	Status	Submitted By	Purge Date
<input type="button" value="OK"/>					

8. Select the **Download Template** button.
- Based on your browser settings, the employee spreadsheet template opens or saves.
9. Fill out the spreadsheet with employee changes and save the file as **CSV** file type.



**IMPORTANT:** CSV is the only file type supported for batch uploading employees.

10. In the **Broker** panel **Upload File** section, select the **Browse...** button.

The **Choose File to Upload** dialog box displays.

11. Navigate to the location of and select the employee spreadsheet file.

12. Select the **Open** button.

The dialog box closes and the file path populates in the **File:** field.

13. Select the **Upload File** button.

The success message will display and a record displays in the employee submission table.

**Broker**

Upload Employees batch job has been successfully submitted

**Upload File**

File:

[Download Template](#)

Showing 1 - 1 of 1

Batch Sequence #	File Name	Submit Date/Time	Status	Submitted By	Purge Date
000000276	Upload Employees_2.csv	11/14/2019 10:55 AM	Received	<a href="#">Vinny Mince</a>	02/12/2020

14. Select the **Batch Sequence #** for the most recent employee submission.

The details of the employee submission displays in the **Broker** panel.







- 15. Select the **OK** button.  
The employee submission section closes.
- 16. Select the **OK** button.  
The **Upload File** section closes. Uploaded employees display in the **Employees** tab.

**Broker**

Update Employees Submission  
Batch Sequence #: 000000276  
Submit Date/Time: 11/14/2019 10:55 AM  
Purge Date: 02/12/2020

Status: Complete with Warnings  
Submitted By: [Vinny Mince](#)  
Original File: [Upload Employees\\_2.csv](#)

Update Employees Results  
Total # of Records: 1  
Total # of Successes: 1  
Total # of Warnings: 1  
Total # of Errors: 0  
Warning/Error Detail: [000000276\\_Results.csv](#)

<a href="#">Contacts</a> <a href="#">Addresses</a> <a href="#">Licensed Brokers</a> <b>Employees</b> <a href="#">Waiver Requests</a> <a href="#">Permit User Fees</a>		
<a href="#">Upload Employees</a> <a href="#">View Uploads</a> <a href="#">Download Current</a> <a href="#">Download All</a> <a href="#">Add Employee</a>		
Showing 1 - 5 of 5		
Name	Street (Physical) Address	Telephone
<a href="#">Employee01 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314	
<a href="#">Employee02 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314	
<a href="#">Employee03 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314	
<a href="#">Employee04 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314	
<a href="#">Employee05 Training</a>	10409 MAIN ST FAIRFAX VA 22030-3314	

